

To Enroll in the Roth IRA Payroll Deduction Plan:

There are four forms that need to be completed to enroll in the investment plan. The forms can be obtained on-line or in a packet from the Personnel Office.

- Complete both sides of the “City of Lincoln Employees’ Payroll Deduction Investment Plans” application. *If you are currently participating in the Investment Plan through payroll deduction, please confirm your investment election and payroll deduction dollar amount.*
- Complete the American Funds “Roth IRA Application” and “Beneficiary Designation Form”.
- Complete the “Payroll Deduction Customer Information Form”.
- Return all completed forms to Personnel Office.